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ABSTRACT

This guide is intended to help individuals with deaf-blindness or other severe disabilities and the people involved with them to plan positive futures. An introduction notes that Personal Futures Planning is different from other planning meetings in that all participants are there voluntarily, there are no rules, and the planning is done "with" the individual and family, instead of "for" them. This planning philosophy tries to involve all the significant people influencing an individual's life and focuses on the individual's preferences and strengths, rather than his/her problems or disabilities. The basic steps of an effective planning process are enumerated as are components of the planning process: designing the planning process, building a personal profile, the planning meeting, and creating a future over time. Additional guidelines are given for forming the on-going group and for building a personal profile. A sample "map" of an individual's past and present is attached. Another sample "map" illustrates an individual's relationships. Examples of ways to identify the individual's preferences and images of the future are also illustrated. A sample action plan which lists specific steps, timelines, and individuals responsible completes the packet. (Contains 11 suggested readings.) (DB)

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A Brief Guide to

PERSONAL FUTURES PLANNING

by

Kate Moss and David Wiley

ED 390 203

ORGANIZING YOUR COMMUNITY TO ENVISION AND BUILD A DESIRABLE FUTURE WITH YOU.

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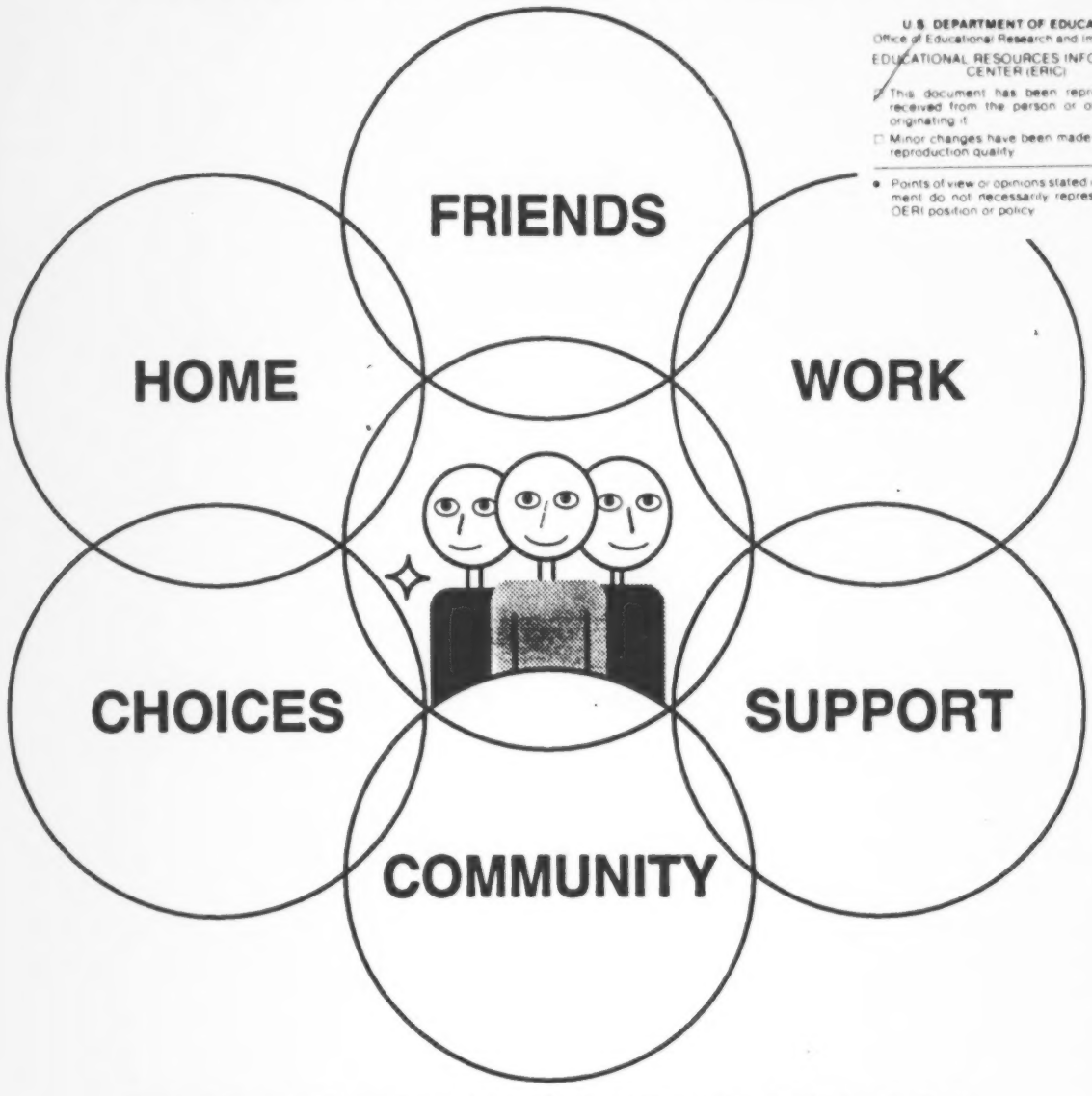

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A BRIEF GUIDE TO PERSONAL FUTURES PLANNING

by Kate Moss & David Wiley, Outreach Program, T.S.B.V.I.

A DIFFERENT WAY TO THINK ABOUT PLANNING

The Personal Futures Planning process is different than other kinds of planning you may have taken part in because of both the underlying philosophies and the methods employed. The differences can be seen in the focus, the identities of the people involved, the questions asked, and the level of follow-through. Consequently, the outcomes are often different, and hopefully more positive.

This process would be beneficial for anyone, young or old. The Outreach Program has been training facilitators to lead this process and create positive futures for individuals with deaf-blindness, and severe multiple disabilities. The fact that the process focuses on these individuals' capacities rather than their limitations, however, is only one way it may differ from more traditional planning.

THE FOCUS

Personal Futures Planning is different than most planning meetings for people with disabilities simply because it is voluntary for everyone involved. The meetings are not mandated by any law, and no one needs attend unless he or she wants. No participant is assigned anything to do during the meetings. Even though, hopefully, participants will be accomplishing great things individually and as a group, all action is voluntary.

Because no one is required to take part, there are no rules as such. Committed individuals form a group or "circle" that is self-governing. With the help of a facilitator, the group decides where, when, and how often to meet, as well as what the goals are. Personal Futures Planning is very flexible, and there are no forms to fill out. There are some guidelines that help make the process successful, however they are not specific. Any formula would limit the process, and take away from its diverse nature.

The focus is also different because planning is done *with* the individual and his or her family, instead of *for* them. Even when professionals consider their meetings student-, client-, or family-centered, these meetings usually take place on the professional's "turf". Generally they are held in intimidating offices or conference rooms and at times which make it difficult to get the entire family and other community members to gather. Agendas are often laid out in advance, to conform to a regulation or paperwork requirement.

Personal Futures Planning is done anywhere the group finds comfortable and convenient--someone's home, church, park, classroom, library, etc. The group picks a mutually workable time for meetings. It is an informal setting, often including snacks and some time to socialize. Participants usually find Personal Futures Planning to be

fun and exciting, even though they are dealing with difficult and often emotional issues.

THE PARTICIPANTS

For most of us, friends and neighbors have a greater impact on our lives than bureaucracies. You may remember that you found your first job or apartment through family or neighborhood connections. Unfortunately, these powerful connections fail to develop or get severed for many people with disabilities. Planning and support is turned over to agency staff members who are often caring, but ultimately uninvolved.

Traditionally, planning by different groups is usually done in isolation. Families make plans at home. Schools and agencies plan in their respective buildings. Community clubs and organizations make plans at their own meetings, as do churches, neighborhood groups, and so on. Transition Planning for students nearing graduation is one step toward unified planning, but it is limited in time and scope. With Personal Futures Planning, all of the significant people influencing an individual's life sit down in the same room. Together with the individual they make decisions and plan appropriate actions as a unified group.

THE QUESTIONS

When employing the Personal Futures Planning philosophy, we start by asking, "What are this individual's preferences and strengths?" The focus is not his or her problems or disabilities. Instead of asking what we as professionals and family members feel the individual needs, we ask, "What does the individual want? What choices does he or she make? What things do we know work well from that person's perspective?" The participants in the process try to identify what the ideal situation might be in the person's future. They also identify obstacles that may stand in the way of reaching this person's unique ideal situation, and brainstorm ways to work around those barriers. Traditional planning methods most often lead us to describe the existing service options, and decide where a person might best fit. This results in a very limited number of "individualized" situations, stifling creativity, and making us settle for circumstances that are less than ideal. Personal Futures Planning gives us permission to dream.

THE FOLLOW-THROUGH

Personal Futures Planning is successful because the action taken is done in small and easily achieveable steps. Because the goals are not overwhelming, the group immediately achieves some success. As successes start to build, an air of excitement is created among group members. This leads them to dream ever bigger dreams. Momentum is maintained by the commitment of the group to meet fairly often to celebrate successes, reaffirm promising actions, and brainstorm new solutions for overcoming obstacles. Personal Futures Planning does not wait to see what the future holds. Personal Futures Planning actively creates a bright future for an individual by organizing and utilizing the energies of those who care most about that person.

THE BASIC STEPS OF AN EFFECTIVE PLANNING PROCESS

An effective planning process includes several basic steps. The design of a planning process that includes these steps is far more important than the details of each component. The greatest amount of quality change occurs in people's lives when:

1. *People begin with a clear and shared appreciation of the gifts and capacities of the focus person.*
2. *Committed people develop a common understanding of a specific positive future: a common dream.*
3. *Committed people agree to meet regularly to brainstorm and make commitments to act. These people are often those who spend a lot of time with the person or have known the person for a long time.*
4. *The group includes at least one person --- a family member, advocate, community member, staff person or the person who is the focus of the planning --- who is a* ***champion*** *of the dream. This person makes extraordinary efforts to bring the dream into reality.*
5. *At least one agency or community organization is committed to supporting the implementation of the plan.*

Taken from Making Futures Happen: A Manual for Facilitators of Personal Futures Planning by Beth Mount, published through the Minnesota Governor's Council on Developmental Disabilities, St. Paul, MN.

COMPONENTS OF THE PERSONAL FUTURES PLANNING PROCESS

1. **Getting started**: designing the planning process. A Personal Futures Planning facilitator works with the focus person, family, and others to determine:
   a. who should be involved in the planning process;
   b. how the process should be adapted to fit unique challenges and opportunities; and
   c. how to create the conditions, such as meeting location and time, that will make the plan most likely to succeed.

   This step may be done in person or over the phone prior to the development of the personal profile and the planning meeting.

2. **Telling stories**: building a personal profile. The facilitator meets with the person and those who know him or her the best among family, friends, and professionals to :
   a. build a description of the life story of the person, his or her capacities and preferences, opportunities available, and situations that may present challenges; and
   b. lay the groundwork for the planning meeting.

   This phase may take 2-3 hours and can be done separately or immediately before the next phase.

3. **Dreaming together**: the planning meeting. The facilitator assists the group who developed the personal profile and any additional interested people involved with the focus person to:
   a. consider the persons unique preferences, abilities, opportunities, and challenges while building a plan for the future; and
   b. make commitments for specific, small action steps to help make the dream a reality.

   This phase may take 2-3 hours and can be done separately or immediately after the personal profile phase. If done separately, additional people may join the group to take part in the planning meeting. If that is the case, the personal profile should be reviewed for the larger group, and any "maps" drawn should be available for all to see.

4. **Following through**: creating a future over time. The group meets regularly to:
   a. share accomplishments and review progress made on the action plan; and
   b. discover and commit to the next steps for action.

Adapted from Making Futures Happen: A Manual for Facilitators of Personal Futures Planning .

WHO IS IN THE GROUP?

Personal Futures Planning begins when a group of people and a Personal Futures Planning facilitator join together to focus on how to support one individual in creating and working toward dreams for a happy and meaningful life. The facilitator helps the group get organized and helps guide the discussion at meetings. People who know the focus person from a variety of different circumstances will be attending planning sessions. It is important that everyone to get to know and feel comfortable with one another. The first step of any Personal Futures Plan is learning from everyone who he or she is, and how he or she is connected to the focus person.

The group should include the individuals who have the most knowledge about the focus person and the community where the person lives. This would include the individual who is the focus of the planning process, family members (parents, siblings, grandparents, etc.), friends of the individual or family, community members who are knowledgeable about the individual and/or the resources available in the community (neighbors, ministers, civic leaders, co-workers, teachers, classmates, human service personnel, etc.), and other individuals who care and are willing to commit to on-going planning and support. The planning group's membership may evolve over time, but it would be best to have at least the following persons included for the first meeting:

- the individual who is the focus of the plan
- parent/s, and at least one other family member, especially siblings
- at least one friend of the individual or the family
- at least one representative from the community that is not a service provider
- at least one representative from an agency or human service provider
- for students, at least one representative from school who knows the individual well.

WHEN IDENTIFYING GROUP MEMBERS IT IS IMPORTANT TO REMEMBER:
Group members participate in regular meetings which may occur as often as every 6-8 weeks depending on the situation and needs of the focus person. After the first meeting, which may take about 3-4 hours, subsequent planning meetings usually last about 1-2 hours. If some family members or friends are coming from far away, they may not be able to meet with the group on a regular basis. However, they can contribute information during the initial profile and planning meetings and be kept informed of the progress of the group. There may also be others who will not continue on as part of the regular group, but have information to share in the beginning or later when special needs arise. People are welcome to join in as their time and circumstances allow, but there should be an ongoing commitment from a core group of people to meet regularly for the plan to have a good chance of success. One member of the group will take over the facilitator's role at some point. That person will be responsible for organizing and leading the meetings. The original Personal Futures Planning facilitator should be available to the group's new facilitator if needed for support.

BUILDING A PERSONAL PROFILE

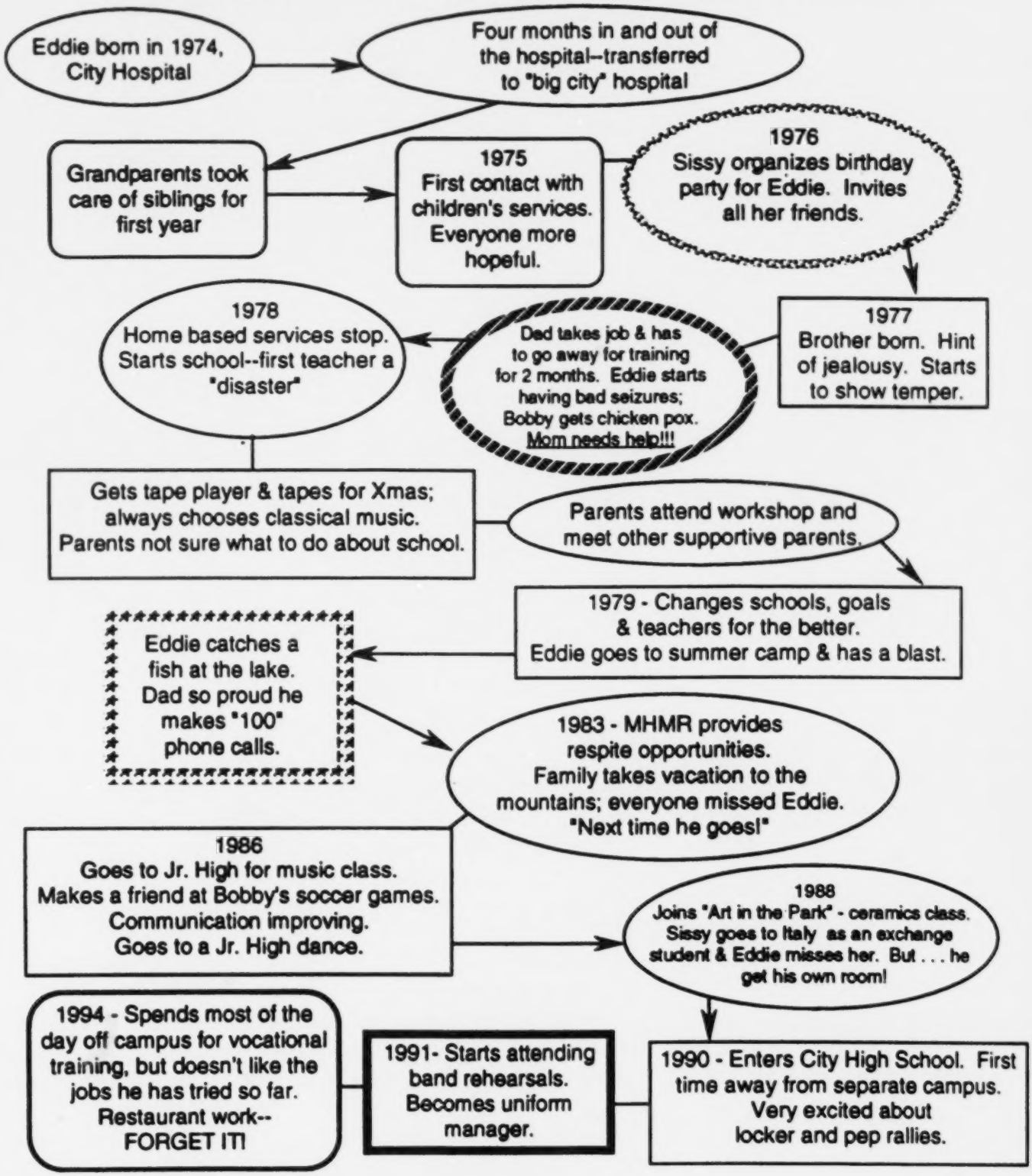
The following maps--History, People, Places, Preferences, and Images of the Future--are representative of the maps used to create a personal profile. These five maps generally apply to anyone. You might also want to map choices, communication, capacities, health concerns, contributions, responsibilities, "nightmares", or any other pertinent issue. The format for each individual's plan is unique based on his or her circumstances. The facilitator, or a scribe working with the facilitator, draws these maps on poster-size paper based upon the comments of the meeting participants. As they are completed, the maps are placed around the room so everyone can see them. As a total picture begins to emerge, participants can easily look at the many facets of an individual as they join in forming a shared appreciation of that person, and a common dream for the future.

The facilitator or scribe draws simple illustrations and uses a variety of colors while sketching out the maps. Colors can help make the maps easier for the participants to reference: green for positive experiences and opportunities; red for negative experiences and barriers; yellow for highlights, and so forth. Pictures help bring the information to life, making it more vivid for the participants. Lively maps also emphasize the more informal nature of the meeting.

When permanent records of the maps are made for the participants, the facilitator tries to accurately represent all of these pictures and the unusual design. This helps those reviewing the plan to remember the meeting better, as well as graphically reminding people that this meeting was different than traditional planning meetings that are summarized with minutes or reports.

EXPLORING THE PAST AND PRESENT

THE BACKGROUND MAP PROVIDES A HISTORY OF THE PERSONAL LIFE EXPERIENCE OF THE FOCUS PERSON AND A LOOK AT HIS OR HER FAMILY AND COMMUNITY LIFE.

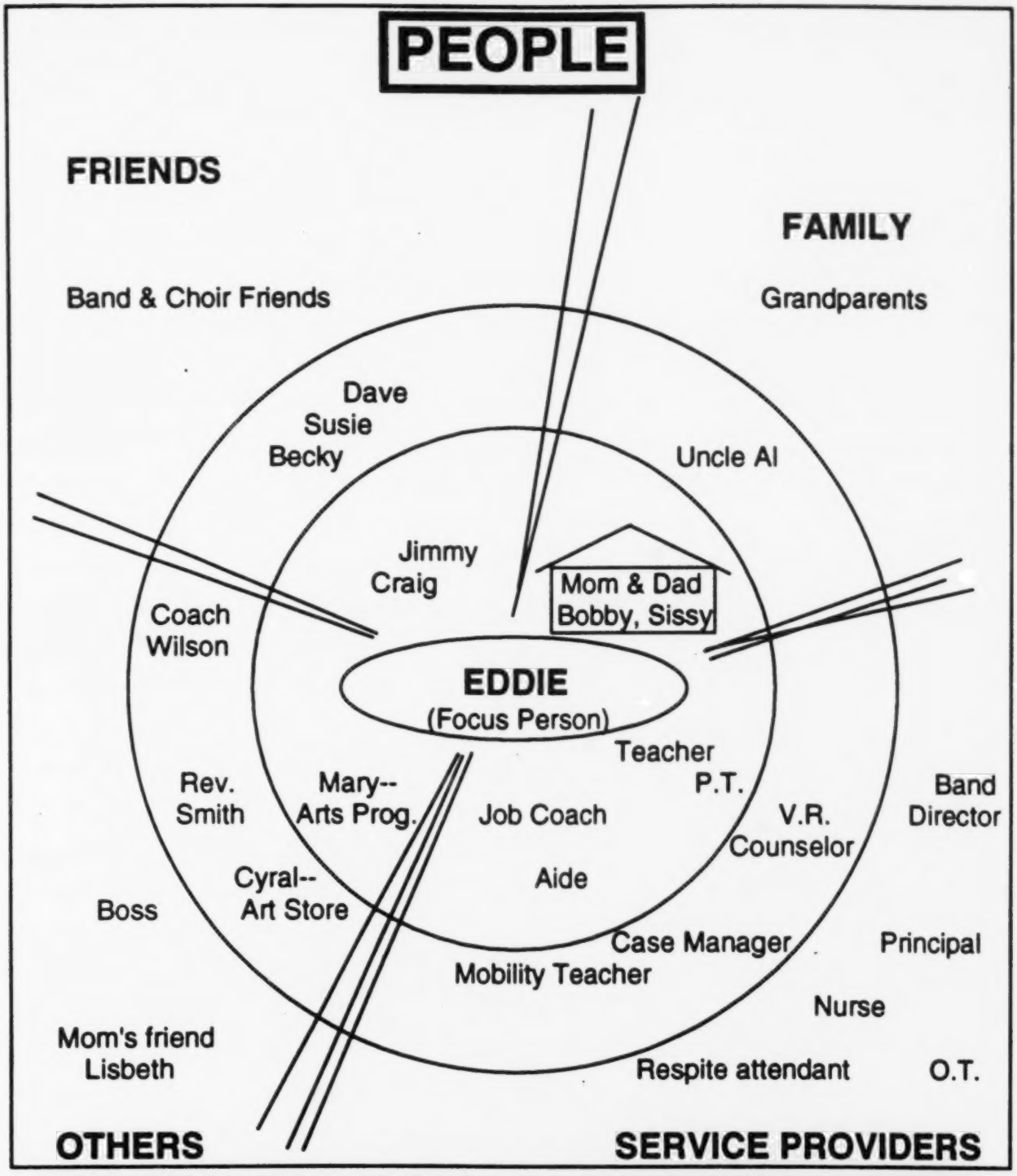

Eddie born in 1974, City Hospital
Four months in and out of the hospital--transferred to "big city" hospital
Grandparents took care of siblings for first year
1975 First contact with children's services. Everyone more hopeful.
1976 Sissy organizes birthday party for Eddie. Invites all her friends.
1977 Brother born. Hint of jealousy. Starts to show temper.
Dad takes job & has to go away for training for 2 months. Eddie starts having bad seizures; Bobby gets chicken pox. Mom needs help!!!
1978 Home based services stop. Starts school--first teacher a "disaster"
Gets tape player & tapes for Xmas; always chooses classical music. Parents not sure what to do about school.
Parents attend workshop and meet other supportive parents.
1979 - Changes schools, goals & teachers for the better. Eddie goes to summer camp & has a blast.
Eddie catches a fish at the lake. Dad so proud he makes "100" phone calls.
1983 - MHMR provides respite opportunities. Family takes vacation to the mountains; everyone missed Eddie. "Next time he goes!"
1986 Goes to Jr. High for music class. Makes a friend at Bobby's soccer games. Communication improving. Goes to a Jr. High dance.
1988 Joins "Art in the Park" - ceramics class. Sissy goes to Italy as an exchange student & Eddie misses her. But . . . he get his own room!
1990 - Enters City High School. First time away from separate campus. Very excited about locker and pep rallies.
1991- Starts attending band rehearsals. Becomes uniform manager.
1994 - Spends most of the day off campus for vocational training, but doesn't like the jobs he has tried so far. Restaurant work-- FORGET IT!

A personal history for the focus person from birth to present is generated by the group. The individual and those who have known him or her contribute information by telling stories about significant events. The background map created helps the group to understand the life experience of the focus person and his or her family.

All participants gain a greater appreciation of the individual as a whole person, with a broad range of experiences, struggles, and achievements. The positive experiences point out opportunities upon which the group can build; the problems and barriers encountered give the group a greater sense of the effort required to make good things happen. This map helps to celebrate the accomplishments and to show how opportunities in the present are often a result of experiences and actions in the past.

This simple exercise has surprisingly powerful results. Deciding what stories other people need to hear often helps participants clarify which things they feel are most important. All the participants, including the focus person and family, learn some things they never knew and begin to look at events with a new perspective.

Information collected is "mapped out" by the facilitator as the participants tell their stories. The facing page illustrates the idea of a background map. An actual map contains simple pictures of important events and has more details.



This map illustrates the person's relationships. The inner circle is for those who are closest to the person. It includes people who see the person every day, or with whom he or she has a very close bond. The second circle is for those people the individual is involved with on a regular basis. The outer area is for those people whom the individual knows and finds meaningful, but with whom there is not as much opportunity to have contact. The map indicates relationships which must be protected in future plans, and points up areas where additional relationships need to be fostered. The "Places" map on the next page is used in much the same way.

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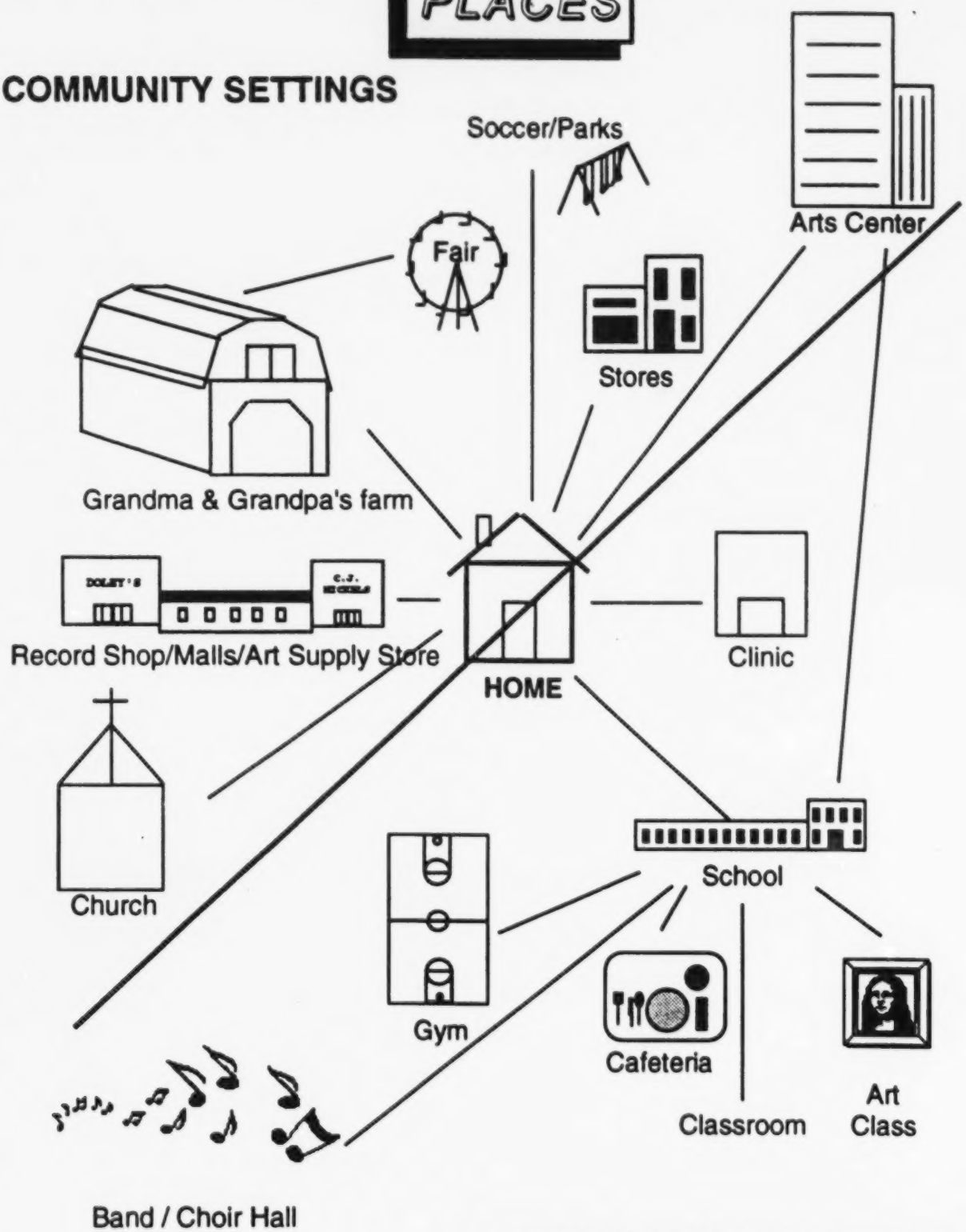
PLACES

COMMUNITY SETTINGS



HUMAN SERVICE SETTINGS

PREFERENCES

WHAT WORKS Creates interest, engagement, joy, or is a strength	WHAT DOESN'T Creates upset, frustration, boredom
Loves music	Rushing
Loves having own room	Being away from home too long
Enjoys friends from past & new friends	Too many new things at once
Getting to organize own space	Meaningless activities
Enjoys good food	Being left out
Enjoys parks, camping opportunities	Cold weather
Likes doing own thing	Harsh criticism
Enjoys taking care of plants	Not getting enough sleep!!!
Doing creative/artistic projects and going to art "happenings"	Not having things fully explained
Enjoys having a pet	Stairs/long walks
Enjoys dancing	Having no control or influence
Needs to have choices	Working where it is too hot
Having opportunities to help others	
Enjoys traveling	
Enjoys working and earning money	
Enjoys people and doing things with them/being in the middle of things	
Enjoys kidding around, a laugh, something off-beat	
Dressy clothes, looking nice	

MAPPING PREFERENCES REMINDS THE PARTICIPANTS THAT THE WISHES OF THE FOCUS PERSON SHOULD BE THE BASIS FOR THE DREAM. THE GROUP DISCOVERS CAPACITIES TO BUILD ON AND CONDITIONS TO AVOID. THIS MAP HELPS ILLUSTRATE PATTERNS IN THE GIFTS, POTENTIAL, INTEREST AND UNIQUE CONTRIBUTIONS OF THE PERSON. IT ALSO HELPS IDENTIFY PATTERNS IN THE CONDITIONS THAT BLOCK OR CHALLENGE THE DEVELOPMENT OF OPPORTUNITIES.

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IMAGES OF THE FUTURE

New images of the future emerge as an individual and people who care explore ways to fully express the person's capacities and interests in the community. Participants bring together inner hopes and dreams with a new appreciation for the person's gifts and preferences to form a shared dream for the future. This chart helps illustrate what the focus person desires for his or her home, job, community life, and personal life. This is a picture of a dream.

HOME

- Own home in the neighborhood
- Support person to help with household chores, money management, shopping
- Someone always available for emergencies

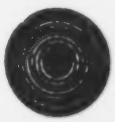
- Small yard and a pet
- One or two housemates

- Guest room for family and friends to visit
- Porch swing

- Near work or bus line
- Live near sculpture garden and art supply store

WORK

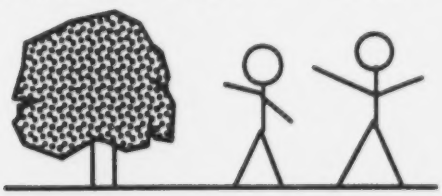
- Work around music, art, or out-of-doors
- Enjoys organizing and routine, so could work in a supportive job in an environment such as City Arts Council



- Could work part-time and do some volunteer work, or work full-time
- Part-time work at a record or art store or volunteer work at a library or museum

- Need to make enough money to take a camping trip each year

COMMUNITY LIFE



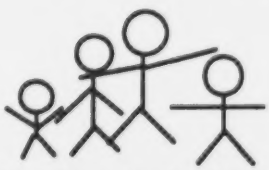
Outside with people frequently
Lots of friends

Attend church

Help pass out programs at the symphony

Would like to join a group to go camping and fishing

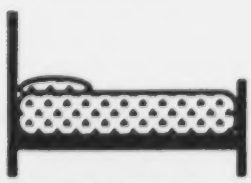
PERSONAL LIFE



Have time to visit family
Have friends over to visit with me and listen to music.

Go out to dinner or camping with friends

Eat dessert first sometimes



Stay up late and sleep in on Saturdays

Work on ceramics when I want to

PLANNING AND TAKING ACTION FOR THE FUTURE

After the personal profile is complete, the group works together to develop an action plan based on the image of the future. The facilitator leads the group in determining the opportunities to be explored and obstacles to be overcome in order to make the dream become reality. From this discussion the group develops strategies or action steps which group members agree to work on before the next meeting. The action plan includes steps to be taken, the person or people who will be working on each step, and a time-line. The focus of the plan may be broad or narrow, depending on what is needed at the time.

Group members may work individually or collectively to accomplish the steps, which should be specific and concrete. No assignments are made. All steps are initiated by volunteers who are willing to work on the actions they suggest. It is important that participants be realistic, and not volunteer to do too many things at once. Keeping goals simple and easy to achieve fosters a sense of accomplishment and keeps the group feeling positive and motivated.

Often the obstacles encountered by the group have to do with the limitations and constraints of service systems. Service systems can prevent a person's vision of the future from being realized if procedures and regulations are inflexible. Administrators of human service organizations need to be willing to consider systems change as a possible outcome if they lend their support to the process. New possibilities and wonderful changes may occur when systems make exceptions in order to try new ways for one person to negotiate system-centered obstacles.

The group reconvenes regularly to maintain progress and stay focused on the goals. Group members gather as often as they feel is needed to continue taking positive steps toward realizing the dream. The frequency of the meetings may vary over time based on the circumstance of the focus person and schedules of the participants. However, it is best if the group meets fairly often at the beginning, so that the momentum of the original planning meeting can be maintained, and the participants can form a sense of group identity and togetherness. It would be best if the first follow-up meeting occurs within 6-8 weeks after the initial plan is developed.

During regular follow-up meetings, group members review the progress they have made on their action steps. Goals may be modified, added, or discontinued as new obstacles and opportunities are identified. It is important that someone take notes at each meeting, so that all participants are clear about their responsibilities in accomplishing the steps of the action plan. From time to time group members should revisit the image of the future to remind themselves of the ultimate destination. The group's actions should always support this vision.

Sometimes strategies need to be reconsidered, and the dream of the future will probably change some over time. However, it is important that the dream remain true to the focus person, and not change based solely on "what's available now". The group must continue to dream, brainstorm, and develop strategies for getting around the barriers that stand in the way of the dream.

As time goes on, some group members may drop out, and new members may be invited to join the circle: people who have become important to the person or the family; people who can provide information or resources; people who want to help. This document and good notes from the follow-up meetings will help them to become a part of the group and share its enthusiasm.

ACTION PLAN
FOR EDDIE'S PERSONAL FUTURES PLANNING GROUP

1. Contact the volunteer program for the City Arts Council to see if they need people to pass out programs at the symphony.	Before the next meeting.	Mary - Arts Program Director for Parks and Recreation
2. Contact Hit Records & Tapes as a possible job training site for Eddie during this coming school year.	Within two weeks	Bob - VR Counselor Anne - Job Coach
3. Invite Cyral who owns the Art Supply Store to come over for dinner with the family and share information with her about Eddie's Personal Futures Plan.	Before next Saturday.	Mom, Dad, Bobbie and Eddie
4. Contact the Arts Council to find out what art events will be happening during school hours that could be accessed during a weekly planned extracurricular time slot.	By next Monday.	Mary - Arts Program Director for Parks and Recreation
5. Find out about bus or special transit schedules for Eddie to access to get to arts activities.	By next Monday.	Dave and Susie - Friends
6. Contact the Special Education Director about providing an aide to go with Eddie to arts activities during an extracurricular time.	After Monday, but before the next meeting.	Mrs. Meyers - Teacher Mom and Dad
7. Call realtors for information about HUD, Section 8, etc. as possible sources for finding/funding a home.	Before next meeting.	Reverend Smith & Lisbeth
8. Call the Wilderness Club about membership information and schedule of activities.	Before next meeting.	Sissy

Suggested Readings on Person-Centered Planning

Beth Mount and Kay Zwernik (1988). *It's Never Too Early, It's Never Too Late.* St. Paul, MN: Governor's Council on Developmental Disabilities.

Beth Mount (1990). *Making Futures Happen: A Manual for Facilitators of Personal Futures Planning.* St. Paul, MN: Governor's Council on Developmental Disabilities.

These books by Beth Mount and Kay Zwernik are available from the Minnesota Governor's Council on Developmental Disabilities, 300 Centennial Office Bldg., 658 Cedar Street, St. Paul, Minnesota 55101, (612)296-4018.

Pat Beeman, George Ducharme, and Beth Mount (1989). *One Candle Power: Building Bridges into Community Life for People with Disabilities.* Manchester, CT: Communitas, Inc.

Beth Mount, Pat Beeman, and George Ducharme (1988). *What Are We Learning About Bridge-Building?.* Manchester, CT: Communitas, Inc.

Beth Mount, Pat Beeman, and George Ducharme (1988). *What Are We Learning About Circles of Support?.* Manchester, CT: Communitas, Inc.

Beth Mount (1991). *Dare to Dream.* Manchester, CT: Communitas, Inc.

Beth Mount (1990). *Imperfect Change.* Manchester, CT: Communitas, Inc.

Beth Mount, George Ducharme, and Pat Beeman (1991). *Person Centered Development.* Manchester, CT: Communitas, Inc.

These books written by Beth Mount, Pat Beeman, and George Ducharme are available from The Community Place, 730 Main Street, Manchester, CT 06040, (203)645-3177.

John O'Brien (1987). A guide to life-style planning. In B. Wilcox and G. T. Bellamy (Eds.), *A Comprehensive Guide to The Activities Catalog* (pp. 175-189). Baltimore: Paul H. Brookes Publishing Co.

John O'Brien, and Herbert Lovett. *Finding a Way Toward Everyday Lives: The Contribution of Person Centered Planning.* Harrisburg, PA: Pennsylvania Office of Mental Retardation.

Terry Vandercook, Jennifer York, and Marsha Forest (1989). The McGill Action Planning System (MAPS): A strategy for building the vision. *The Journal of the Association for Persons with Severe Handicaps*, Volume 14, Number 3, pp. 205 - 215.

Additional copies of this paper are available from the authors at:
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